STANDARD OPERATING PROCEDURE

# Patient Intake and Registration SOP

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| **Document no.** | SOP-HLC-001 |
| **Revision** | 1.0 |
| **Owner** | Patient Access Supervisor |
| **Effective date** | September 15, 2026 |
| **Review cycle** | Every 12 months |

## 1. Purpose

To register every patient accurately and safely, confirm identity before any clinical activity begins, and hand off a complete record to the care team without delay.

## 2. Scope

Applies to walk-in and scheduled patient registration at front desk and rooming stations. Emergency department triage and telehealth intake are covered by separate SOPs.

### Definitions

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| **Two-identifier check** | Confirming a patient's identity using two unique identifiers, such as full name and date of birth, matched against a photo ID. |
| **EHR** | Electronic health record system used to document demographics, visit notes and clinical data. |
| **Red flag symptom** | A symptom reported at check-in that may need immediate clinical attention, such as chest pain or difficulty breathing. |

## 3. Responsibilities

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|---|---|
| **Patient Access Representative** | Greets patients, verifies identity and insurance, collects consent forms and enters demographics in the EHR. |
| **Registered Nurse (RN)** | Rooms the patient, records vital signs, reconciles medications and allergies, and screens for urgent symptoms. |
| **Patient Access Supervisor** | Resolves registration discrepancies, oversees front desk staffing and audits registration accuracy. |
| **Provider** | Receives the intake summary, reviews flagged issues and begins the clinical visit. |

### RACI matrix

| Activity | Patient Access Representative | Registered Nurse (RN) | Patient Access Supervisor | Provider |
|---|---|---|---|---|
| Verify patient identity and demographics | R/A | I | C | - |
| Verify insurance and collect consents | R/A | - | C | - |
| Screen for urgent symptoms at | R | A | I | I |

| Activity | Patient Access Representative | Registered Nurse (RN) | Patient Access Supervisor | Provider |
|---|---|---|---|---|
| check-in | | | | |
| Record vital signs and reconcile medications | - | R/A | - | I |
| Resolve registration discrepancies | R | - | R/A | - |

R = Responsible, A = Accountable, C = Consulted, I = Informed

## 4. Materials and PPE

### Materials, tools and systems

- Electronic health record (EHR) or practice management system
- Government-issued photo ID scanner
- Insurance card scanner or manual entry form
- Wristband printer and blank wristbands
- Consent and privacy acknowledgment forms
- Vital signs equipment (blood pressure cuff, thermometer, pulse oximeter)
- Patient intake and health history questionnaire
- Interpreter phone line or translation service access

### Personal protective equipment

- Disposable gloves for taking vital signs
- Hand sanitizer at the registration desk

## 5. Procedure

| Step | Task | Owner | Done |
|---|---|---|---|
| 5.1 | **Greet the patient and confirm the visit**<br>Greet the patient by name where possible, confirm the scheduled appointment or reason for the walk-in visit, and direct them to the registration desk or kiosk. | Patient Access Representative | ☐ |
| 5.2 | **Verify identity with two identifiers**<br>Ask the patient to state their full name and date of birth, then match this against a government-issued photo ID and the EHR record before proceeding.<br>**Checkpoint:** Identity is confirmed with two identifiers matching the photo ID before any form or wristband is generated. | Patient Access Representative | ☐ |
| 5.3 | **Update demographics in the EHR**<br>Confirm or correct the patient's address, phone number, emergency contact and preferred language in the EHR, and note any accessibility or interpreter needs. | Patient Access Representative | ☐ |
| 5.4 | **Verify insurance and collect payment**<br>Scan or enter the insurance card, run an eligibility check in the practice management system, and collect any co-pay or outstanding balance according to facility policy. | Patient Access Representative | ☐ |

| Step | Task | Owner | Done |
|---|---|---|---|
| 5.5 | **Collect consent and privacy forms**<br>Provide the privacy practices acknowledgment and treatment consent forms, explain their purpose in plain language, and obtain the patient's signature.<br>**Checkpoint:** Signed consent and privacy forms are on file in the EHR before the patient is roomed. | Patient Access Representative | ☐ |
| 5.6 | **Print and apply the ID wristband**<br>Print the wristband from the EHR record, read the name and date of birth aloud to the patient to confirm, and apply it before any clinical contact.<br>**Checkpoint:** Wristband information matches the EHR chart exactly before the patient leaves registration. | Patient Access Representative | ☐ |
| 5.7 | **Screen for urgent symptoms**<br>Ask a short set of screening questions for symptoms such as chest pain, difficulty breathing or severe bleeding while completing paperwork.<br>**Warning:** If the patient reports a red flag symptom, stop registration and get a nurse or provider immediately. | Patient Access Representative | ☐ |
| 5.8 | **Room the patient and take vital signs**<br>Escort the patient to the exam room, take and document blood pressure, pulse, temperature and oxygen saturation in the EHR according to facility policy. | Registered Nurse (RN) | ☐ |
| 5.9 | **Document the reason for the visit**<br>Record the chief complaint, onset and relevant history in the patient's own words in the EHR so the provider has an accurate starting point. | Registered Nurse (RN) | ☐ |
| 5.10 | **Reconcile medications and allergies**<br>Review the current medication list and allergy history with the patient, update the EHR, and flag any new allergy or discrepancy for the provider.<br>**Checkpoint:** Allergy status is confirmed and visible in the EHR banner before the visit begins. | Registered Nurse (RN) | ☐ |
| 5.11 | **Resolve registration discrepancies**<br>When identity, insurance or demographic information cannot be confirmed, the supervisor works with the patient and payer to resolve it before the visit is billed. | Patient Access Supervisor | ☐ |
| 5.12 | **Hand off to the provider**<br>Summarize the reason for visit, vital signs and any flagged issues for the provider, either verbally or through the EHR task queue, before leaving the room. | Registered Nurse (RN) | ☐ |

## 6. Quality checks

- Two-identifier verification is documented for 100 percent of registrations.
- Wristband information matches the EHR chart on spot checks during the shift.
- Signed consent and privacy forms are scanned into the chart within the same visit.
- Insurance eligibility is verified before service wherever the payer allows same-day checks.

## 7. Records

- Signed consent and privacy acknowledgment forms
- Insurance verification and eligibility results
- Vital signs and intake questionnaire in the EHR
- Registration discrepancy log

## 8. KPIs

- Average registration time per patient
- Percentage of visits with insurance verified before service
- Wristband or identity error rate
- Rate of same-day registration corrections

## 9. Common mistakes

- Confirming identity by room number or appointment order instead of two identifiers.
- Printing the wristband before demographics are corrected in the EHR.
- Skipping the medication and allergy reconciliation question to save time.
- Not escalating a patient reporting urgent symptoms while still filling out paperwork.

## 10. Revision history

| Revision | Date | Description | Reviewed by |
|---|---|---|---|
| 1.0 | September 15, 2026 | Initial release | Ilia Pirozhenko |

## Approval

| Prepared by | Approved by | Date |
|---|---|---|
| | | |

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